

HR Termination Checklist



Employee Name	Termination Date
INITIAL PAPERWORK	
<input type="checkbox"/> Notice of Termination from Employee (if applicable) <input type="checkbox"/> Received Personnel Action Form (PAF) <input type="checkbox"/> Give copy of PAF to Accounting <input type="checkbox"/> Give copy of PAF to FSO (if applicable) <input type="checkbox"/> Schedule Exit Interview with Employee <input type="checkbox"/> Coordinate with manager details of Employees last day (collecting material, CAC card badges, etc.) <input type="checkbox"/> Coordinate with Accounting on where to send final paycheck	
DELIVER TO MANAGER/SUPERVISOR	
<input type="checkbox"/> Termination Letter to Employee (if involuntary term) <input type="checkbox"/> HIPP Notice (Full time <i>CA employees</i>) <input type="checkbox"/> Unemployment Pamphlet (<i>CA employees –involuntary terms</i>) <input type="checkbox"/> Notice of Change in Employment Status (<i>CA employees</i>)	
DELIVER TO EMPLOYEE	
<input type="checkbox"/> 401 (k) Loan Options Upon Distribution notice (<i>if a participant with loan</i>) <input type="checkbox"/> Send optional life insurance conversion letter and Request form to Employee (<i>FT employees</i>)	
HR TASKS	
<input type="checkbox"/> Email enroll/cancel form to broker to cancel insurance & send COBRA notification <input type="checkbox"/> E-mail Hicks 401k Notice of Employee Termination Form <input type="checkbox"/> I-9 – Put in Termination Book <input type="checkbox"/> Move employee file from Active to Terminated <input type="checkbox"/> Notify Facilities to remove from email accounts and phone list <input type="checkbox"/> Remove from Org Chart <input type="checkbox"/> Move Electronic Resume to In-Active File <input type="checkbox"/> Update Turnover spreadsheet <input type="checkbox"/> Enter term info into Paychex	